# Using Heidi Health – Web version

## Getting Started

Heidi is your friendly AI medical scribe! It works alongside you by converting real-time conversation into clear, tailored medical notes. Heidi can be used in different ways either using the web version, download the desktop app or mobile app.

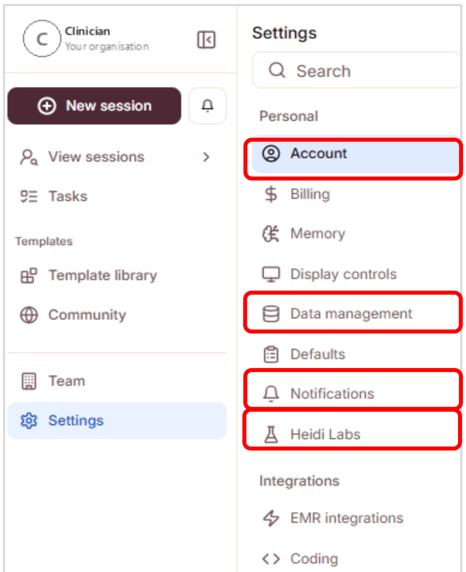
### How Heidi Works

1. **Consult:** before using the tool, clinicians **must** obtain **patient consent**.
2. **Transcribe:** sessions are converted into text, any sensitive information mentioned Heidi will de-identify it.
3. **Format:** uses standardised clinical format
4. **Review:** clinicians **must review** the final note **before finalising** and saving it to the patient's record.

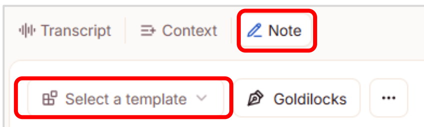
## Set up with Heidi account

1. Open your browser e.g MS Edge or Chrome (Chrome is recommended)
2. Enter the following address https://scribe.heidihealth.com
3. Login screen will be displayed, enter your work email address and click Sign in with email
4. Enter your password then click Continue
5. Heidi opens with your account

### *User Settings*




6. Select Settings from the left panel, a Personal Settings panel will be displayed
7. Personal **Account** will be displayed on right hand side, on the section **About you** update *Title, First name, Last name, Speciality* (to identify your default template), *Company size* and select *Your role* as 'Individual clinician'.
8. Scroll down to the **Login details** section, Multi-Factor Authentication (MFA) Enable MFA, is enabled by default. You will be asked to setup MFA separately.
9. On the **language & time** section select your preferred *Date format*
10. Select Display controls from Settings panel, under **Security & compliance** section, *show consent pop-up* is on by default, review the section **Viewing & editing sessions** for *Default tab on the new sessions,* select whether your session to start with Note, Transcript or Context (this can be changed during your session also). *Open live transcription in split view* can be turned on if required.
11. Under Data management tab, set the automatic deletion of session times (default setup is 14days).
12. Select Defaults, on **Language & spelling** section, ensure your *Default input language* to be 'English, Te Reo Maori', and *Default output language* to be 'English', for *Spelling* field select 'UK English'.
13. **Session defaults** section, on *Default scribe* select 'Best' (recommended).
14. *Default note template* select a template from the list displayed e.g. ED Admission Note. Templates can be changed from within a session on the Note tab.




15. *Default dictation*, set it to be 'Word-for-word'
16. *Default style* field select from the dropdown list 'Goldilocks' (this is can be adjusted over time also).

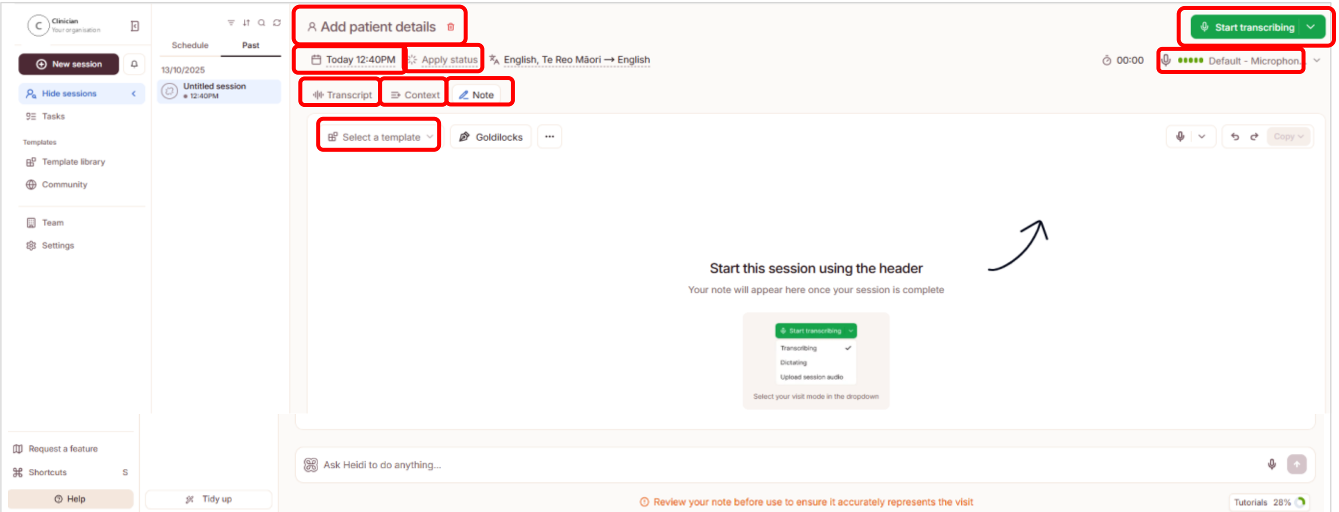
### *Before Starting New Session*

- Ensure you have access to wifi or cellular network. With Heidi app, you can run sessions offline.
- Heidi requires a working microphone for transcribe & dictate functions.
- For TeleHealth, open Heidi on a separate browser window to transcribe notes live, to support headphones and view live transcription during consult.

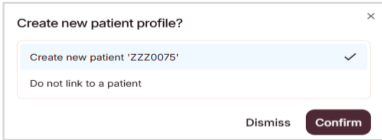
- Test your microphone & internet speed
- Run quick demo to familiarise yourself, use ‘Tutorials’ located at the bottom right corner of your window.

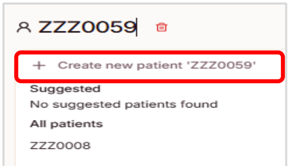
## New Session

1. Begin by obtaining **patient consent** to use Heidi Health.
2. Login to Heidi health, enter MFA code and click Continue, home screen displays New session.




3. Click on **Add patient details** at the top. Type the NHI (this is an essential step as it helps differentiate sessions and keeps your records organized), then click “Confirm” on the prompt that appears (this prompt show only 1st time you use Heidi and add a patient). Next time you add a patient, a prompt will appear:



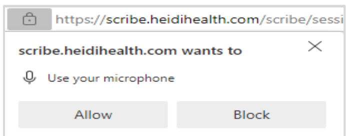



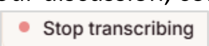

   - Select **+ Create new patient ‘ZZZ0059’**
   - A green textbox will appear at the bottom of the window,


4. Choose the date of when the session occurred, by default will be set to current.
5. Set the status of the note using the dropdown menu of **Apply status** if required.
6. Select the tab to start with live **Transcript**, **Context**, or **Note**. Every session will have those three tabs and you can select one to display.
7. Select the required template if you are on the **Note** tab by clicking the tab **Select a template** – if no default template was specified when you set up your Settings > Defaults.
8. Click 

dropdown arrow to display the menu options: Transcribing, Dictating, or Upload session audio (use this if you previously recorded your session on your phone – Please note: if you are using your personal phone, ensure that MFA is turned on for added security). To begin, click Start transcribing, ensure the microphone is on (if red it is not working).

   **NOTE**: you may need to grant microphone access through your browser or system settings the first time you use this feature by clicking **Allow**.




9. **Begin** by stating the **patient NHI** and **demographics** (this is essential for identifying the recording) then proceed with your discussion, consultation and recommendations as you normally would, until session is complete, then select 

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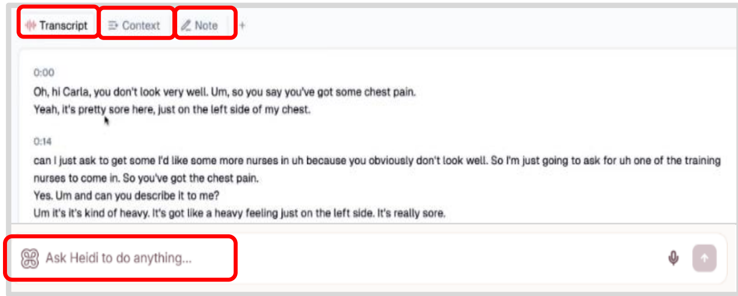
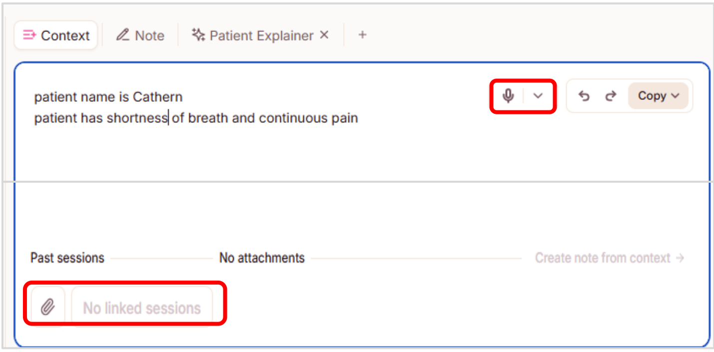
10. Within a few seconds, the transcribed text will appear on the **Note** tab. If you would like to check your recording, it will be automatically linked to transcript and to view it click on **Transcript** tab, allowing you to review it at any time.



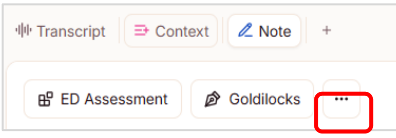

11. The **Note** tab: this where the final note is generated, your transcript will be generated automatically.

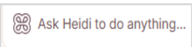
12. A **Tasks** pane will be showing on the right-hand side of the **Note** as shown If anything was recorded as done, it will still show that task with a ✓ on the option button

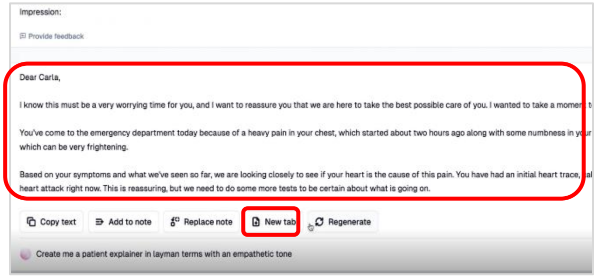

13. The **Context** tab allows you to add additional information in the following ways:
    - Verbal Input: Tap the microphone icon at the top right of the window to speak and add context verbally.
    - Type additional text manually: Attach relevant files or documents
    - Text or File Attachments: Use the paper clip icon at the bottom left
    - Linking to Past Sessions (if needed): Click and select the appropriate option to link this context with information from previous sessions (only 3 sessions can be included as context).



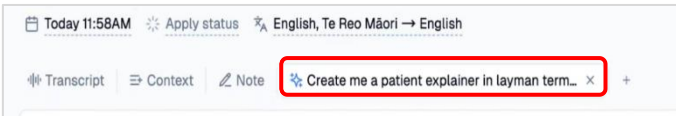

14. If any verbal content or typed text needs to be added then use the **Context** tab:
    - Once completed
    - Select the **Note** tab, click on
    - Select **Regenerate output** from the dropdown list or use Ctrl+O, Transcript plus Context will be displayed in the **Note** tab.




15. If you need to ask Heidi Health anything, there is at the bottom of the screen  e.g. you can type 'create a patient explainer in layman terms with an empathetic tone'. Text will be displayed as shown.




16. Click on **New tab** at the bottom of the Note, that will display a new tab as shown, and the content is displayed on this tab.




**NOTE**: For any accidental mistakes, you can use the **Context** tab and add the correct info e.g. patient name was spelled incorrectly 'Catherine' then you can type 'patient name is Katherine', then select the **Note** tab and click on the and choose from displayed menu 'Regenerate output' or use Ctrl+o, the name will be changed.

17. Please ensure you <u>check your note carefully before finalising it.</u>

18. Change the Status of your Note to be **final**